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December 1986 Corporate Advertising

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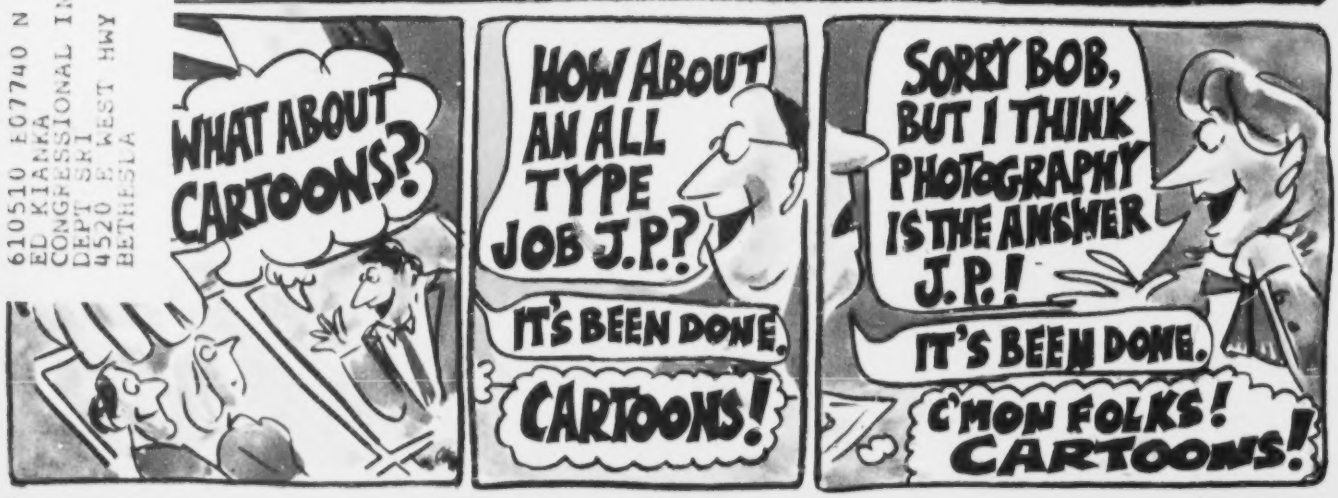
WHAT ABOUT CARTOONS?
HOW ABOUT AN ALL TYPE JOB J.P.?
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CARTOONS!
SORRY BOB, BUT I THINK PHOTOGRAPHY IS THE ANSWER J.P.!
IT'S BEEN DONE.
C'MON FOLKS! CARTOONS!

PUBLIC RELATIONS JOURNAL

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After a 69.2 percent increase in 1984, 1985's survey shows a decrease of 8.7 percent. Network television skews the findings. *By Meryl Davids*

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Trinova's current corporate ad campaign features images from Flash Gordon and Buck Rogers. Goodyear has the "Three Schmoos." Times Mirror has commissioned cartoonist Ralph Steadman. In their efforts to show corporate humor and humanity, have these companies started a trend? *By Michael Winkleman*

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National Journal has 5,000 subscribers and a CPM that is 12 times higher than the *Washington Post*'s. But it's making money by accepting only corporate advertising—and the publics are responding. A talk with the publishers. *By Herbert Swartz*

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Cover Illustration: *Karen Leon*

15th ANNUAL REVIEW OF CORPORATE ADVERTISING EXPENDITURES

by Meryl Davids

TOTAL expenditures for corporate advertising by companies fell in 1985 for the first time in three years, solely the result of a decrease in expenditures for network television. But corporation expenditures for other types of media tracked in the survey and corporate advertising expenditures by associations all saw increases in 1985.

This decrease in corporate expenditures for network television, industry experts say, may be less reflective of an impending trend than of the normal spending swings by a few big players and by the striking increase in network-TV corporate advertising the year before—due, in part, to the Olympic games.

"Nineteen eighty-four was an exceptionally inflated year," says corporate-advertising expert Thomas Garbett. "Seen in that light, 1985 was not a bad year at all. And, if you compare corporate advertising to the suffering that went on in the rest of the advertising field, you might even say it did surprisingly well."

The survey, compiled by Leading National Advertisers (LNA), tracks corporate advertising in consumer magazines, newspaper supplements, network and spot television, radio, and outdoor. Cable TV networks were also tracked for the first time in 1985. The report does not evaluate expenditures in newspapers, excluding such mainstays of corporate advertising as the *Wall Street Journal* and the *Washington Post*. For purposes of the survey, corporate advertising is defined as any advertising not promoting a specific product; issue advertising is included in the calculations.

Following on the heels of a 69.2 percent increase in total corporation expenditures in 1984, 1985's survey saw a decrease of 8.7 percent for the six media combined (Table 1). Network-television advertising, dropping 29.3 percent, was the only category to see a decline, but the substantial dollars involved in this medium were enough to reduce the overall total. By contrast, associations stepped up their spending in the six media by 36.6 percent over the previous year, including a record 143.2 percent increase in newspaper supplements.

Spot television continued to rise as a vehicle for corporate advertising. Corporations increased their spending in this category 6.9 percent in 1985, even after the phenomenal 285.2 percent growth the year before. And associations increased their spot purchases by 36.8 percent. Dick Severance, senior vice president of the Television Bureau of Advertising, says this growth in spot television is likely to continue. "Companies and organizations are recognizing that they have greater interests in some cities and not in others," he says.

Severance thinks the spot-TV increase is a better indication of overall trends than is the slump in network spending. "To a great extent, network TV is more reflective of what a few big corporations are doing," he says. "Companies come in with big dollars to correct big problems, but it's only temporary. Since the total dollars we're dealing with for corporate advertising is small, if a handful of companies throw a few million into the pot in the same year, a huge swing can result."

A large decrease in network television expenditures by a few of the biggest advertisers does, in fact, account for a substantial part of the overall decline. Dropping off the corporation Top 10 list entirely (Table 2) was 1984's number-five spender, Beatrice Company, which, following its recent leveraged buyout, is no longer a publicly held company and therefore no longer needs a corporate advertising campaign aimed at investors. The Reagan for President Committee—tabulated by LNA as a corporate advertisement—and sixth on 1984's list, was, of course, dropped at the end of that year.

And AT&T, slipping to second on this year's list of Top 10 advertisers behind the now-number one Ford Motor Company, weighs in at $22.5 million for network television in 1985, a sharp drop from the $51.6 million recorded for '84.

Dick Martin, corporate advertising manager for AT&T, says the drop in expenses parallels the company's divestiture timetable. "In 1984, our first year as a separate company—and a company no longer allowed to use the well-known 'Bell' name—we had to spend large sums of money to tell people who we were," he says. In 1985, the year when people were able to select their long-distance carrier, the company changed its campaign to tell people why they should choose AT&T. "That's when we launched our 'Right Choice' campaign," Martin says, "to influence the public's perception of our quality, reliability, and service."

The 'Right Choice' campaign included substantial use of network radio—AT&T was the only Top 10 company to use this medium to a great extent—because, Severance notes, the campaign had a good jingle that lent itself well to radio, and because the company wanted its slogan to register quickly and radio is a high-frequency medium.

AT&T's 'Right Choice' campaign illustrates a trend many observers say has

Article continues on page 48 ►

TABLE 1: CORPORATE ADVERTISING EXPENDITURES, 1981-1985

Corporation Advertising (in $ thousands)

	Consumer Magazines	Newspaper Supplements	Network Television	Spot Television	Radio	Outdoor	SIX-MEDIA TOTALS	Cable TV Networks*
1981	$249,152.0	$ 5,264.1	$118,794.7	$ 40,395.2	$ 7,866.4	$ 665.2	**$422,137.6**	*
1982	205,300.1	7,593.8	150,102.9	28,118.1	11,175.2	918.0	**403,208.1**	*
Percent change	(17.6%)	44.3%	26.4%	(30.4%)	42.1%	38.0%	**(4.5%)**	
1983	219,512.7	4,205.5	197,267.9	25,201.6	9,661.0	843.0	**456,700.7**	*
Percent change	6.9%	(44.6%)	31.4%	(10.4%)	(13.5%)	(8.2%)	**13.3%**	
1984	296,309.9	9,465.4	366,591.8	97,080.0	10,318.9	3,219.0	**782,985.0**	*
Percent change	34.9%	125.0%	85.8%	285.2%	6.8%	281.8%	**69.2%**	
1985	323,323.4	10,498.9	259,148.8	103,820.2	13,450.9	4,455.4	**714,697.6**	11,315.9
Percent change	9.1%	10.9%	(29.3%)	6.9%	30.4%	38.4%	**(8.7%)**	N/A

*1985 = first year measured

Association Advertising (in $ thousands)

	Consumer Magazines	Newspaper Supplements	Network Television	Spot Television	Radio	Outdoor	SIX-MEDIA TOTALS	Cable TV Networks*
1981	$46,222.8	$1,918.4	$ 50,125.4	$119,014.1	$ 6,130.6	$4,566.7	**$227,978.0**	*
1982	46,479.7	2,301.4	60,286.5	150,763.0	6,365.8	4,213.9	**270,410.3**	*
Percent change	0.6%	20.0%	20.3%	26.7%	3.8%	(7.7%)	**18.6%**	
1983	46,059.4	3,569.3	70,001.7	202,838.6	8,968.7	9,600.5	**341,038.2**	*
Percent change	(0.9%)	55.1%	16.1%	34.5%	40.9%	127.8%	**26.1%**	
1984	53,260.9	2,301.4	75,512.5	287,986.5	11,504.9	4,602.7	**435,168.5**	*
Percent change	15.6%	(35.5%)	7.9%	42.0%	28.3%	(52.0%)	**27.6%**	
1985	69,351.6	5,597.2	103,073.0	393,858.2	15,717.9	7,009.7	**594,607.6**	3,171.7
Percent change	30.2%	143.2%	36.5%	36.8%	36.6%	52.2%	**36.6%**	N/A

*1985 = first year measured

Source: BAR/LNA Corporate and Association Report as compiled by Leading National Advertisers

TABLE 2: TOP 10 LEADERS IN CORPORATE ADVERTISING: CORPORATIONS

January-December 1985 (ranked by total media dollars, in $ thousands)

	Seven-Media Totals	Magazines	Newspaper Supplements	Network Television	Spot Television	Network Radio	Outdoor	Cable-TV Networks
Ford Motor Co.	$ 50,811.8	$16,582.1	$ 420.0	$ 29,765.1	$ 341.5	$1,889.6	$ 94.6	$1,718.9
AT&T	44,309.0	12,929.2	—	22,490.4	2,131.5	6,347.4	—	410.5
GM Corp.	35,800.2	18,531.7	319.5	11,360.4	4,526.9	706.4	31.2	324.1
IBM Corp.	26,860.1	7,084.4	1,586.5	17,384.0	681.7	—	—	123.5
Xerox Corp.	21,829.0	210.6	—	21,044.3	88.5	—	—	485.6
GTE Corp.	17,666.8	5,755.0	—	8,040.5	3,696.8	—	25.6	148.9
Chrysler Corp.	13,954.8	3,621.2	210.0	9,012.6	1,011.0	—	—	100.0
ITT Corp.	13,609.7	4,890.4	—	8,383.7	188.9	—	3.2	143.5
Prudential Ins. Co. of America	13,180.6	3,007.2	—	9,680.0	374.2	—	—	119.2
Anheuser-Busch Cos. Inc.	12,196.5	2,436.1	—	8,379.9	1,065.1	—	9.8	305.6
TOP 10 TOTAL	**$250,218.5**	**$75,047.9**	**$2,536.0**	**$145,540.9**	**$14,106.1**	**$8,943.4**	**$164.4**	**$3,879.8**

TABLE 3: TOP 10 LEADERS IN CORPORATE ADVERTISING: ASSOCIATIONS

January-December 1985 (ranked by total media dollars, in $ thousands)

	Seven-Media Totals	Magazines	Newspaper Supplements	Network Television	Spot Television	Network Radio	Outdoor	Cable-TV Networks
GM Corp. Dirs. Assn.	$132,045.7	$ 23.9	—	—	$131,200.0	$ 1.5	$ 820.3	—
American Dairy Assn.	62,354.1	1,259.4	$139.5	$47,760.9	9,188.9	1,929.8	559.9	$1,515.7
Nissan Auto Dirs. Assn.	46,833.8	—	—	—	46,826.4	—	7.4	—
Ford Auto Dirs. Assn.	41,654.6	2.2	—	—	39,713.6	—	1,938.8	—
Blue Cross/Shield Assn.	20,083.8	1,808.5	—	4,530.0	12,184.9	1,264.8	295.6	—
Chrysler Corp. (Dodge and Dodge Truck Dealers Assn. Franchises)	16,710.8	—	—	—	16,629.5	—	81.3	—
Florists Transworld Divry. Assn.	15,037.1	1,992.5	205.5	6,845.6	71.2	5,706.7	111.9	103.7
American Gas Assn.	13,880.7	4,481.7	—	9,072.3	232.7	—	—	94.0
Subaru of America Dirs. Assn.	13,093.8	—	—	—	13,084.5	—	9.3	—
Chrysler Corp. Dirs. Assn.	12,854.0	—	—	—	12,846.4	—	7.6	—
TOP 10 TOTAL	**$374,548.4**	**$9,568.2**	**$345.0**	**$68,208.8**	**$281,978.1**	**$8,902.8**	**$3,832.1**	**$1,713.4**

NEXT MONTH IN PUBLIC RELATIONS JOURNAL

Conference Roundup

The highlights of this year's PRSA Conference, direct from the Conference floor—focusing on "Democracy in Action" and featuring speakers whose areas of expertise run the gamut from the First Amendment to foreign relations, from the politics of change to the politics of confrontation. Including talks by Warren Burger, Tom Wolfe, Helen Thomas, David Gergen, and Harry O'Neill.

The Newsletters

Part Two of a series on the weekly publications that cover the field—and how they reflect their founding editors' personalities and professional views. A visit with Pat Jackson, APR, and the *pr reporter*; Larry Ragan and the *Ragan Report*; and the folks at *Bulldog*.

Public Relations and Pornography

A look at the public relations ramifications of the Meese Commission Report and the 7-11 decision.

Workshop

Prospering under the New Tax Law
Talking High Tech
Planning an Off-Site Meeting

Ethics

A special edition of the ethics column: a take-home quiz.

Briefings

Disney World: A Freebie Fiasco?
You've Got a Friend at Dow

Questionnaire

Salaries

Advertising Expenditures

Continued from page 18 ►

increased in recent years: corporate advertising that is primarily sales-related. "A few years ago, when oil companies were the top spenders, most of the ads were of a 'goodwill' nature, but that's not the case anymore," Garbett says. Severance agrees. "The early 1980s saw the anti-business sentiment die down, primarily because, with the recession, people worried more about making a living. Since that sentiment had weighed heavily in issues advertising, that type of advertising has diminished as well."

Actual expenditures for corporate advertising may be higher than reported, because some ads that are really corporate look a lot like product advertising.

Garbett says the product-sell trend in corporate advertising can be seen in LNA's listing for the Top 10 association spenders (Table 3). Expenditures have soared for many automobile dealers associations, including a $47 million increase for the top spender, General Motors Corp. Dealers Association. "Since the dealers, not the corporation, really sell the cars," he says, "the more the dealers advertise the product lines, the more a corporation like Ford can spend to promote quality—but it's really quality spread across all of its products, for the purpose of affecting sales."

Severance agrees that the distinction between corporate and product advertising is often artificial and may therefore be impossible to measure. He feels that actual expenditures for corporate advertising may be higher than reported, because some ads that are really corporate look a lot like product advertising. "When a company talks about some new wonderful product with advanced technology, that's counted as business-to-business, not corporate, advertising. Yet they are often not trying to sell the tractor as much as they are trying to sell the corporation to the financial community. The intent of the ad is often something outsiders can't detect," he says.

Severance sees this advertising to reach the financial community as a growing trend. "A company like Beatrice in 1984 decided it was undervalued by the financial community," he says. "If the company wants to prevent others from coming in and raiding it, it must tell the financial community what the company is really worth." With the current takeover climate, Severance expects more companies to throw their advertising hats into the ring.

The distinction between what in reality is corporate and what is product advertising is further blurred by growers associations—a class of advertiser Severance sees sharply increasing. Ads such as those by the American Dairy Association, second on the list of association Top 10 spenders (Table 3), are primarily intended to move products out of the grocer's refrigerators. ADA's nearly three-fold increase from 1984 to 1985 reflects the U.S. Government's mandatory assessment for advertising funds from dairy farmers—the more milk sold, the less the government has to buy back from the farmers. Amy Truitt, marketing manager for manufactured dairy products at the ADA, says that advertising expenditures may seem high for a trade association, but, she says, "compared to our competition—soft-drink companies, coffee companies, margarine companies—we're spending very little." Since no milk and few butter companies are large enough to do their own advertising, these companies rely on the ADA to generate consumer demand for their products.

In addition to the car dealers and the ADA, other top association spenders include the Blue Cross/Blue Shield Association, the Florists Transworld Delivery Association, and the American Gas Association, all of which saw increases in their total overall spending.

While Severance thinks 1986 will be a good year for corporate advertising, Garbett fears otherwise. "From the complaints I've been hearing from publications, I suspect this year will not be as good as last—especially for magazines," he says. "In 1986, many companies pulled back on their corporate advertising, partly a result of additional belt-tightening, and partly a result of the stepped-up mergers and acquisitions game. Two companies that merge may eventually launch a new campaign, but it will only be one campaign instead of two."

The review of corporate advertising spending is published each year in *PRJ*. It reflects figures compiled by Leading National Advertisers, which monitors and categorizes advertising in select media after the ads have run. Expenditures are calculated on the basis of one-time open rates from rate cards supplied by the media; therefore, actual expenditures, taking discounts into consideration, should be lower than reported. ■

Meryl Davids is assistant editor of PRJ.

March 1987 The United Nations

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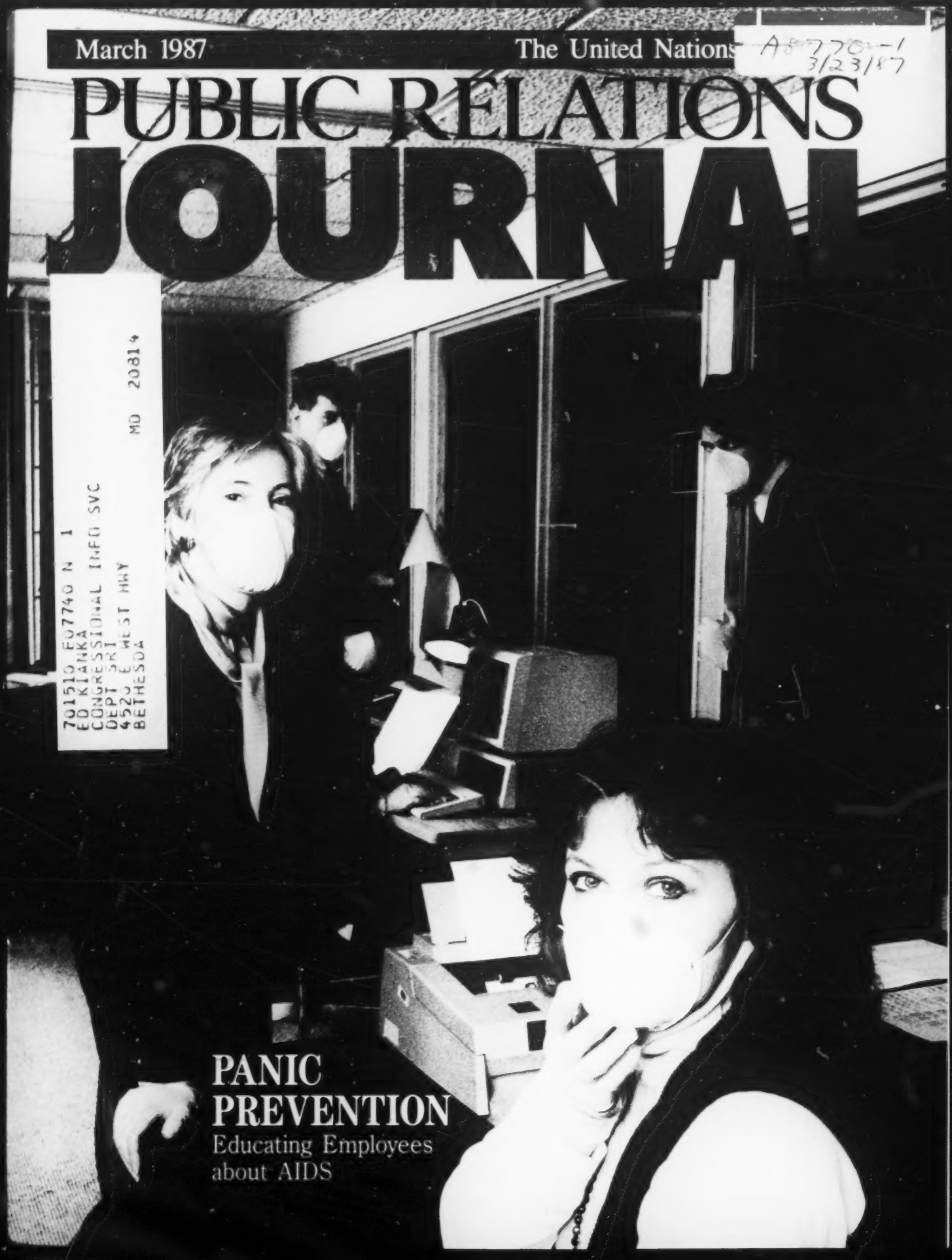

PANIC PREVENTION

Educating Employees about AIDS

INSIDE TRACK

REPRESENTATION

Until the day he walked into PRJ's office and suggested doing an article on public relations at the United Nations, William Baldwin, APR, had not thought about how the world body handled the function. Not so unusual until you know that Baldwin, as public relations director and, later, senior vice president of the National Foreign Trade Council, had been NFTC's UN representative for 15 years.

"I'd volunteered to be the UN representative because I thought it was a way to make a reputation in the organization," he says. "It never occurred to me that they were doing public relations." But that day he had gone to a briefing on "World Chronicle," the UN's "Meet the Press"-style television show, and "I thought: 'This is a big public relations production; I wonder what else they're doing.' "

"Over the years, I'd been to a lot of briefings," he continues, "particularly on the Law of the Sea and on the economic side of things, but I was interested in the briefings in terms of reporting back to NFTC rather than in terms of advocacy," the way a lot of the organizations that are officially represented at the UN see them. "But I never thought of them as part of a public relations program." Much of his approach was conditioned by NFTC's concerns, which are more congressionally than internationally focused.

A number of recent events, however, have put the results of the UN's public relations efforts more clearly in the public eye—most notably the recent portrayal of the UN's insignia and its peace-keeping forces in the television mini-series "Amerika." This, coupled with the appointment of Therese Paquet-Sevigny as the UN's new head of public information raises the issue, explored in Baldwin's piece ("As the World Turns," page 12) of how the function is, should be, and can be performed at an organization that spans continents and cultures.

Public relations at the UN, says Baldwin, is "in competent hands, but they have the same problem I always had and never licked—educating management, selling bosses on the importance of public relations."

For better or worse, public relations is often the silent partner, the behind-the-scenes player. As Baldwin's experience with the UN indicates, even for those whose living is the practice of the profession, the public relations behind organizations and events is often an invisible and unrecognized force. Often it takes a crisis situation, like the airing of "Amerika," to point up its importance.

A current crisis in the workplace that is demanding greater involvement by public relations professionals is the spreading AIDS epidemic—more specifically, the fear of contracting the disease. As *PRJ* assistant editor Meryl Davids discovered in preparing this month's cover story ("Panic Prevention," page 18), many organizations are finding that despite the extensive publicity AIDS has received, there is still a tremendous amount of misunderstanding about it. As a result, when employees are stricken, or rumors arise, fear sets in. Employee education campaigns—which often start by educating top management—have addressed the fears, conveyed the facts, and gone a long way toward not only restoring order to the workplace, but perhaps even stemming the disease's spread.

Also in this issue, the second installment of On the Record, featuring George Schweitzer on how public is the CBS eye; Frank Weaver, APR, on the incursion of doctors into health-care public relations; and Mardy Fones on a Nashville survey of CEO attitudes about the profession.

—Michael Winkleman
Editor

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converts it to a graphic image, which is then painstakingly sent dot-by-dot to your printer. A wide, but by no means complete, variety of printers and word processors are supported. Output is slow by any standard—minutes per page on average. This is not a program to produce attractive business correspondence by the ream, but one that can produce a distinctive master for copying or one-of-a-kind invoices and letters in small quantities.

Printrix for the IBM PC XT, AT, and close compatibles requires 256K of memory and MS/PC-DOS 2.0 or later. A hard disk is not needed. It is available for $120 from Data Transforms, 616 Washington Street, Denver, CO 80203, (303) 832-1501.

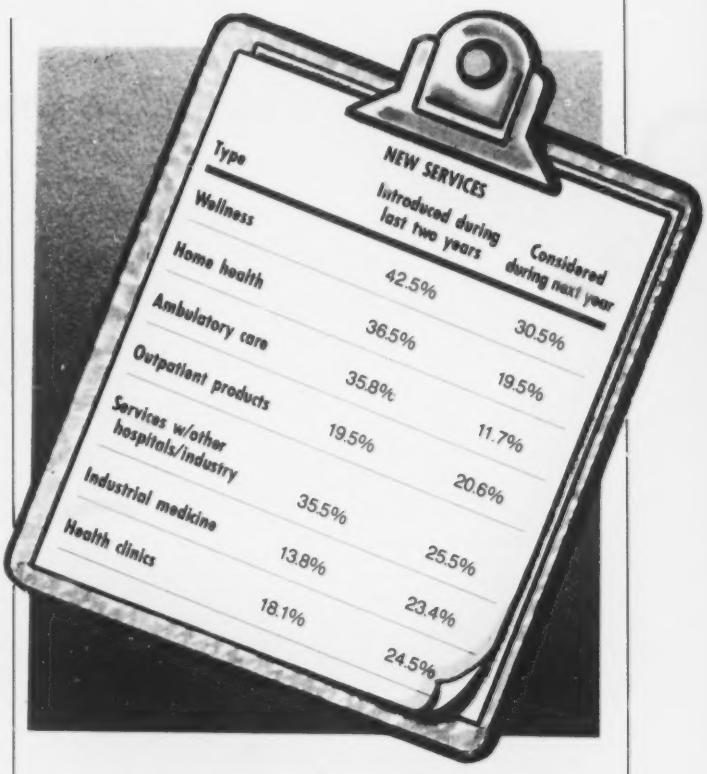
—Howard J. Benner, APR

Howard Benner, APR, president of OMNI Information Resources in Wilmington, DE, frequently writes about software for PRJ.

HOSPITAL ROUNDS

Fifty-nine percent of small or rural hospitals use marketing, and in 60 percent of these health-care institutions, the marketing function is combined with the public relations and/or planning functions. Increasing competition from alternative delivery systems and from larger, urban hospitals makes it necessary for small or rural hospitals to use marketing to maintain market share and increase community awareness of their services. These are some of the findings and conclusions of a recent survey of 476 small or rural hospitals conducted by the American Hospital Association's section for small or rural hospitals.

"Because small or rural hospitals often have limited funding, it is often the hospital administrator and/or the resident public relations or community relations director who is charged with investigating the marketing concept and how it may be applicable to the institution," says James G. Schuman, director of the AHA's small or rural hospitals section.



However, according to the survey, 22.5 percent of respondents have no prior marketing experience, and 32.5 percent have two years or less marketing experience. Only 20.5 percent have five years or more marketing experience.

Marketing accounts for 1 to 4.9 percent of 52.6 percent of respondents' overall budget. And these marketing expenditures are up, for the most part, from the previous year. About 27 percent of respondents report increases of 5 percent or more; 26.2 percent report increases of 1 to 2 percent; 20 percent report no change; and only 4.3 percent report any decrease in their marketing budget.

The new services that respondents are marketing include wellness clinics, home-health care, ambulatory care, contractual services with other hospitals and businesses, outpatient products, health clinics, and industrial medicine (see chart).

The advertising media most often used to market these services are newspapers (87 percent), radio (71 percent), and direct mail (65 percent). Only 26 use billboards or television. Image advertising is more popular than advertising a specific service, with approximately 72 percent of respondents using image ads.

Survey respondents were randomly chosen from a sample of 1,500 small or rural hospitals. The majority of respondents are from facilities with 50 to 99 beds, located outside of metropolitan statistical areas (59.6 and 69 percent respectively). About 52 percent of hospitals surveyed are affiliated with a multi-hospital system, while 48 percent are not.

—C.K.L.

SOFT SELL

Free advertising, direct mail, and marketing advice and information are available through a new telephone hotline. Callers can listen to taped "mini-seminars" that are three to five minutes in length, on subjects such as How to Write Winning Sales Letters, Ten Ways to Stretch Your Advertising Budget, Producing Better Brochures, and Twelve Questions to Ask *Before* You Create Your Next Ad Campaign. Topics are changed weekly, and listeners can obtain written transcripts of the tapes.

The hotline is the brainchild of Bob Bly, a freelance advertising copywriter. "A lot of companies can't afford to hire consultants, and it takes time to read a book, listen to an audio cassette, or attend a seminar," he says. "The hotline is free and takes only five minutes of the caller's time."

Bly readily admits his motivation for establishing the service was not entirely altruistic. The hotline allows prospective clients to "sample" his expertise without cost or obligation, and enhances his credibility with existing clients who have all been notified of the service by Bly's office.

Available 24 hours a day, 7 days a week, the Advertising Hotline can be reached by dialing (201) 599-2276 (callers pay for the call).

—C.K.L.

Illustration by Donna Corri

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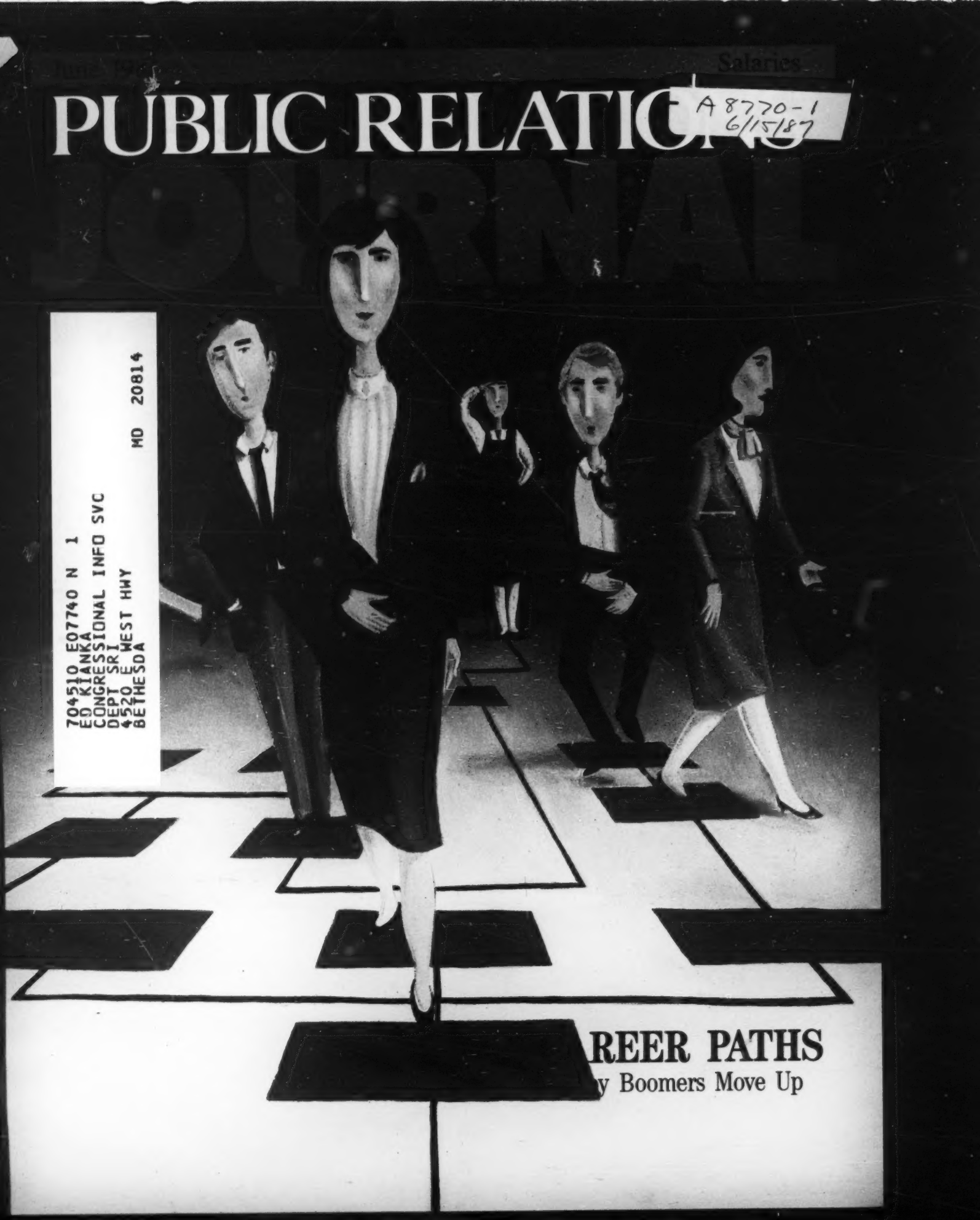

REER PATHS

y Boomers Move Up

PUBLIC RELATIONS JOURNAL

June 1987 Vol. 43 No. 6

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Are men's salaries in public relations higher than women's—or is it a function of age, experience, and position? Do rising salaries in the field flatten out after age 35? *PRJ*'s annual review from Questionnaire results and comparative data. *By John C. Pollock and Michael Winkleman*

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For baby boomers in public relations, confronting the changing face of Corporate America, the opportunities in the field, the realities of the working world, and their own great expectations, necessity remains the mother of invention. *By Joan Condino, APR*

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Before Vietnam, the army didn't worry about public opinion. It didn't need to. Public opinion was on its side. But times have changed. And so has today's army. *By Major James L. Fetig, APR, and Major Gregory Rixon*

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The *Public Relations Journal* is published by the Public Relations Society of America, 33 Irving Place, New York, NY 10003.

Cover Illustration: *Annette Zygarowicz*

SALARY SURVEY

by John C. Pollock and Michael Winkleman

Editor's note: *The survey from which the following results were drawn was conducted as an insert poll in the January 1987 issue of* PRJ. *Respondents were self-selected readers who chose to fill in the Questionnaire and mail it back. The results are not necessarily representative of the universe of public relations professionals but offer insights into trends in the field and, in many cases, correlate well with data drawn from other formal studies.*

Though men continued to earn a higher median salary than women in public relations last year, with the median salary for male *PRJ* Questionnaire respondents coming in $17,000, or 65 percent, higher than for female respondents ($48,000 compared to $31,000), a closer look reveals that much of this disparity can be attributed to the fact that female respondents are, on average, younger and have logged far fewer years in the field. A corollary to this is that a growing percentage of younger practitioners are women, a fact not unique to public relations but found increasingly in all other professions.

Other results of the *PRJ* poll indicate that though salaries for responding practitioners seem to grow quickly during their first 10 to 15 years in the field, or until about age 35, salaries tend to level off, growing only incrementally, on average, over the next 20 years. Perhaps related to this flattening of the salary curve is the predominant impression among responding practitioners that public relations is not as well paid as other professions—a perception that may not jibe with reality.

The 328 respondents to the Questionnaire are 55 percent female, come from every region of the U.S. and Canada, and represent most areas of specialty, with media relations, publicity, special events, corporate communications, marketing, and community relations most prominent.

The median age of male respondents is 42, compared to 33 for women. Two-thirds of male respondents have worked in the field for more than 10 years, while more than two-thirds of women have been in the field for less than 10 years. More than half of male respondents who work for counseling firms are officers or partners (only 13 percent of women are), but one-third of female respondents are account or junior account executives (only 15 percent of men are). Moreover, 84 percent of female respondents have been in their present positions for less than five years, while more than a third of men have held their current positions for more than five years. And, while male and female respondents show up in relatively equal percentages in most areas of practice, men are more evident in public affairs (38 percent compared to 19 percent) and women are more evident in special events (50 percent compared to 35 percent).

So while the median salary for male respondents is higher, the meaning of this median is thrown off by the preponderance of men in the older age groups and higher-paid positions and of women in the younger age groups and lower-paid positions. This finding mirrors last year's *PRJ* study and correlates well with the annual salary survey published by *pr reporter* in late 1986. *Pr reporter*'s survey shows a me-

BALANCE SHEET

Other data emerging from the *PRJ* Questionnaire on salaries reveal that among respondents:

- 60 percent work in departments or firms with one to four professionals.
- 24 percent work in project management, 36 percent in department management, and 18 percent in corporate management. However, 26 percent of men work in corporate management and 73 percent of women work in project or department management.
- 54 percent report to corporate management or the board of directors.
- 45 percent have done graduate work.
- 18 percent work for counseling firms.

dian salary gender gap of $14,500 and finds that more than half of its respondents under 40 years of age are women and more than half of those over 40 are men. The newsletter finds salary gender gaps in each age group (*PRJ*'s sample was too small to determine that with any significance)—small gaps below age 35 that grow considerably wider after that point: In *pr reporter*'s study, men between ages 25 and 29 earn 5.7 percent more than women their age and men between ages 50 and 59 earn a striking 43 percent more than women their age. However, in a ratio similar to that found in *PRJ*'s study, 63 percent of *pr reporter*'s respondents between 25 and 29 are women while 75 percent of its respondents between 50 and 59 are men, another indication of the increasing number and percentage of women in the field—up 2.6 percent (to 42.6 percent) from *prr*'s 1985 study. In addition, this finding appears to indicate that the salary gender gap may be primarily a function of age and experience.

In terms of peaking salaries, *PRJ* respondents indicate relatively large jumps in median salaries up to age 35—with median salaries rising from $25,000 between ages 25 and 29 to $43,000 between ages 35 to 39. However, the median salaries of responding practitioners in their 40s and early 50s are also in the mid-$40,000 range, indicating that after a certain age and level of experience—generally about 15 years in the field, according to this survey—salaries level off and increase only incrementally. The median salary increase among all *PRJ* respondents between 1985 and 1986 is 5.7 percent. This is down from 9.3 percent in *PRJ*'s 1985 poll, but in line with the decrease the Conference Board reports in salary increases for all professionals: from 6.0 last year to 5.5 this year.

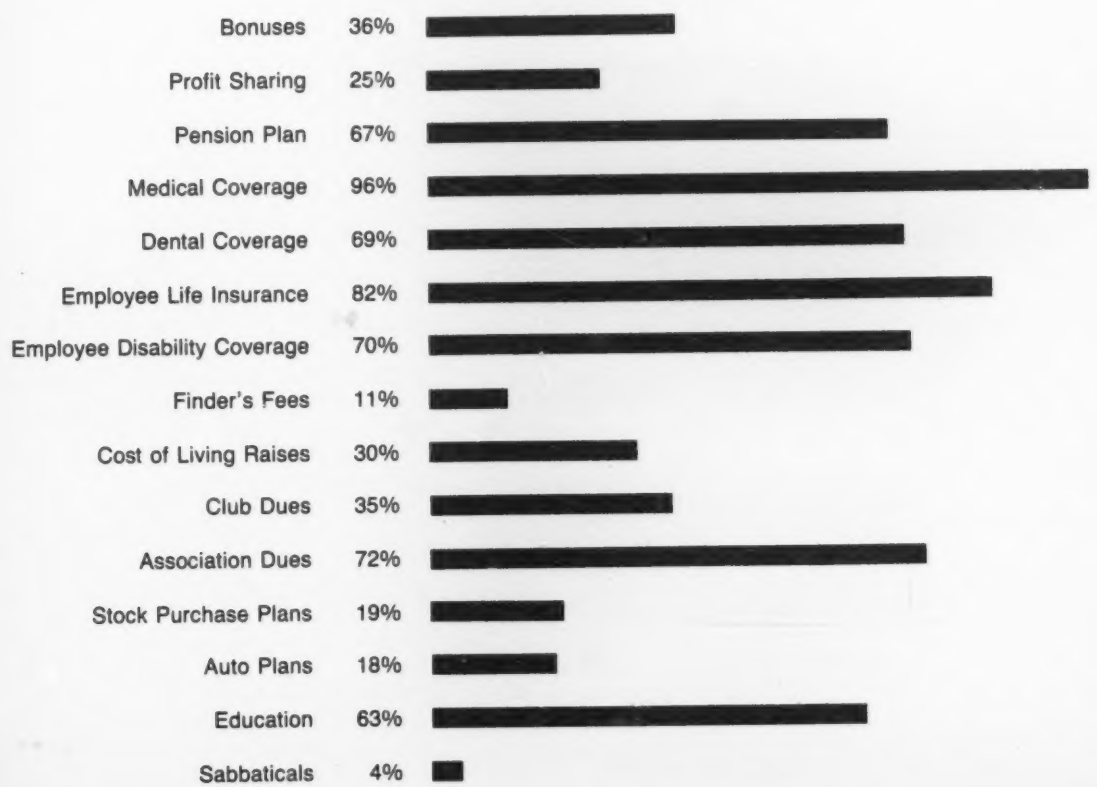
The appearance of this leveling-off process may help explain the appearance of another attitude: two-thirds of respondents believe salaries in public relations are somewhat or much lower than salaries in other professions. No respondents say they are much higher.

Finally, the benefits and perks that most respondents say they receive are most likely to cluster in the areas of health and medical care (medical coverage, life insurance, disability coverage, and dental coverage) and in professional development (association dues, education benefits). Far fewer say they receive profit sharing, stock purchase plans, auto plans, finder's fees, and sabbaticals. ■

John C. Pollock, Ph.D., is president of New World Decisions, Inc., a public relations opinion research firm in New Jersey. Michael Winkleman is editor of PRJ.

BENEFITS

Health insurance and professional development are the leading benefits reported by *PRJ* Questionnaire respondents.



MIRROR IMAGES

Female respondents are younger, have been in the field for fewer years, and, consequently, earn less.

Female Respondents

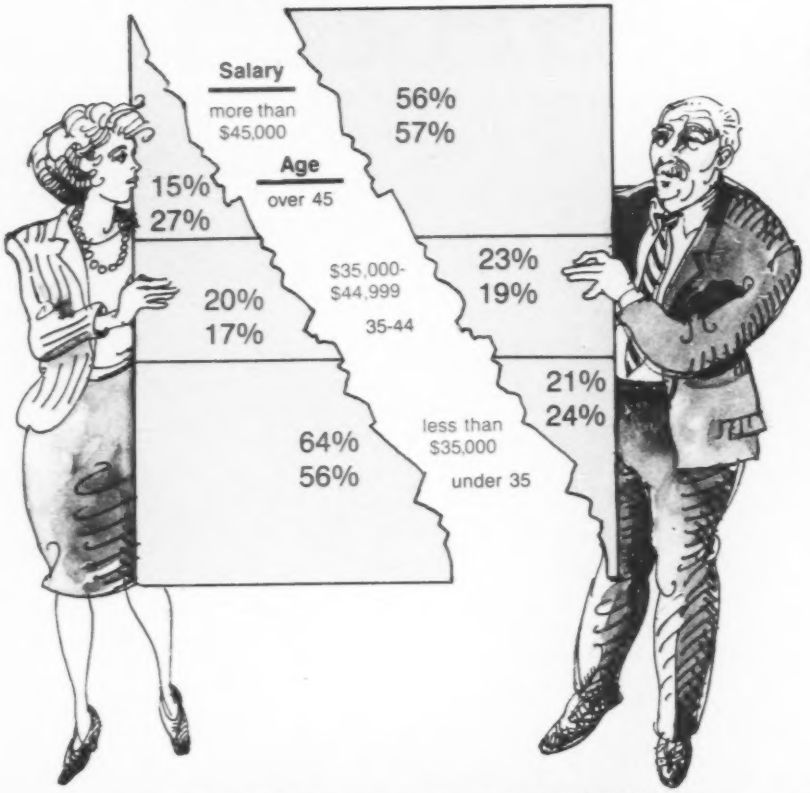
Median 1986 salary $31,000

70% in public relations *less than* 10 years

19% do public affairs

50% do special events

14% Accredited*



Male Respondents

Median 1986 salary $48,000

67% in public relations *more than* 10 years

38% do public affairs

35% do special events

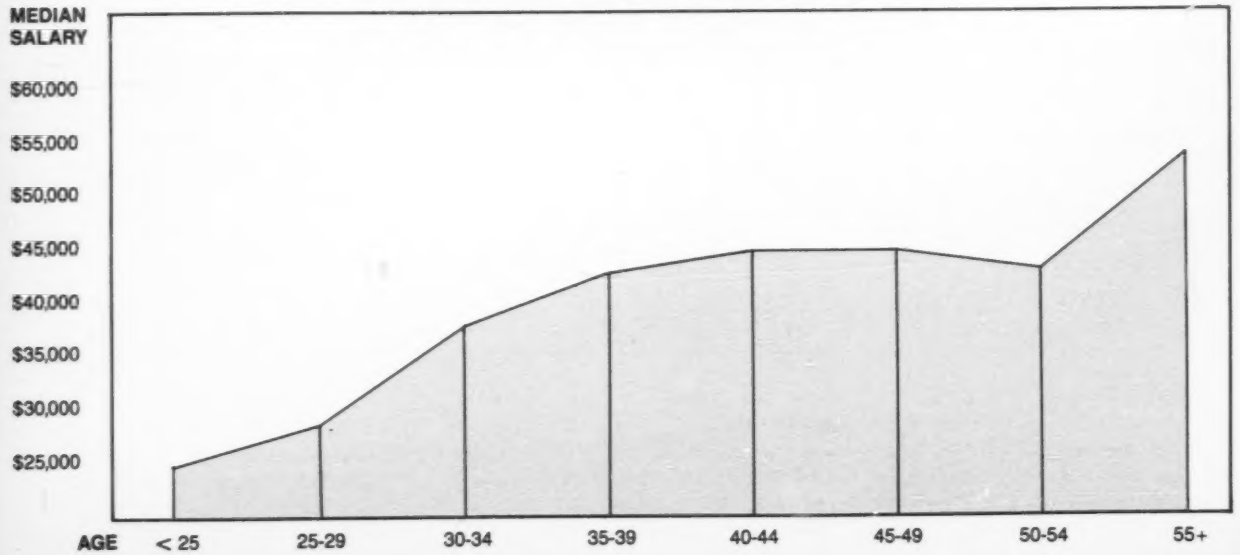
39% Accredited*

*85% of total respondents are members of PRSA

Illustration by Yvonne Buchanan

LEVELING OFF

After age 35, and a salary level in the $45,000 range, respondents report less dramatic increases in compensation.



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CORPORATE ADS COME OUT SLUGGING

PUBLIC RELATIONS JOURNAL

September 1987 Vol. 43 No. 9

FEATURES

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Ed Faruolo never thought he'd want to work for an insurance company. But then, he didn't know just how diverse that industry had become. Neither did that industry's publics. And that's why the Travelers, with Faruolo now running corporate advertising, enlarged its corporate communications staff; pooled its public relations, marketing, and advertising teams; and focused its advertising efforts on the corporate dimension. *By Kristin Nord*

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28 Tough Stuff: 16th Annual Review of Corporate Advertising Expenditures

The trend of using corporate advertising specifically for marketing support is in high gear, with auto makers, auto dealers' associations, and office automation companies leading the pack. Also: Where the data came from. *By Meryl Davids*

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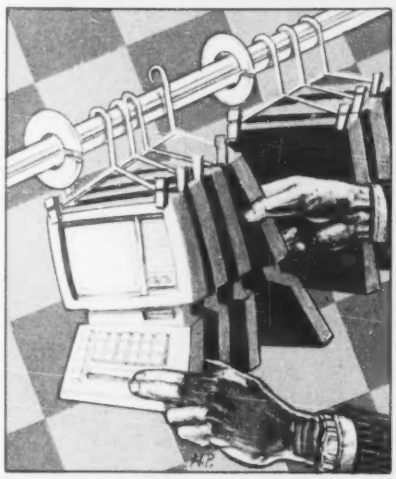
With the line between corporate and product ads finer than ever, the task of classifying the ads is more and more trying. A visit with the classifiers at Leading National Advertisers and a portfolio of recent crossover ads. *By Meryl Davids and Michael Winkleman*



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16th ANNUAL REVIEW OF CORPORATE ADVERTISING EXPENDITURES

TOUGH STUFF

by Meryl Davids

HEAVY spending by auto makers, auto dealers' associations, office automation companies, and others looking to drive consumers to a purchase dominated the expenditures for corporate advertising in 1986, according to a report by Leading National Advertisers (LNA). This trend of using corporate advertising specifically for marketing support began appearing several years ago, and appears to have shifted into high gear.

Total 1986 corporate ad figures for corporations remained relatively stable from the previous year (Table 1), with an 8.6 percent increase in expenditures for six media. But association advertisers stepped up their spending more dramatically, devoting 40 percent more to their corporate ads.

Few of these campaigns in 1986, though, recall the "goodwill" ads that once dominated the category. "The old world of soft corporate advertising is gone," says Tom Garbett, long-time corporate advertising observer. Instead, he says, corporate ads have become more hard-hitting. Computer, telephone, car, and other high-tech companies are turning to these ads in increasing numbers as a way to market their products. These products change from year to year, Garbett says, and consumers want to know that the company stands behind its goods, to know that the company makes quality products, and that it won't be gone when problems set in. "When Nissan advertises now," he observes, "it's not to sell their stock, it's to back their products." Indeed, an analysis of the top 100 corporate ad spenders recently conducted by Garbett shows fully 84 of them intend for their ads to make an impact on sales.

Similarly, another type of advertiser seems to be turning more to corporate ads: retailers. More of them are devoting bigger dollars to ads that will bring customers into the store, by touting their convenient location, trendy styles, or prices that can't be beat. K-mart, for instance, has leaped up to number 12 on LNA's list, spending nearly $11.6 million to promote its stores.

The survey, compiled by LNA, tracks corporate advertising expenditures in consumer magazines; newspaper supplements; network, spot, and cable television; radio; and outdoor. For the purpose of the survey, corporate advertising is broadly defined as any advertising not promoting a specific product.

That corporate advertising is increasingly becoming a marketing tool is also reflected in an ongoing study of corporate advertisers by the Association of National Advertisers (ANA). In this year's study, 45 percent of the 186 respondents say their companies place corporate advertising in the public relations domain, while 42 percent say it's in marketing, a gain from previous years. This increase in the number of marketing groups now engaged in corporate advertising, though, appears to be in new activity, not in a shift of function from public relations, the survey notes.

The move to a marketing orientation may eventually lead to more stability in spending for corporate advertising, Garbett suggests, something that is not yet being seen. LNA's Top 10 list (Tables 2 and 3) again sees substantial turnover this year. Four of the 10 corporations (Dow Chemical, Hewlett-Packard, American Express, and Unisys), and 4 of the 10 associations (Toyota Auto Dealers Association, Volkswagen Auto Dealers Association, Toyo Kogyo Company Auto Dealers Association, and the Hyundai Group) were not on last year's lineup. Car dealers now virtually monopolize the association list, having bounced off the florist and gas associations.

This dealer spending increase, says Dick Severance, senior vice president of the Television Bureau of Advertising, reflects a major move by the car manufacturers in the last few years to organize their dealers into more sophisticated groups. "The dealer groups used to have the worst commercials on TV," Severance says, "where a few guys would stand around, say, 'we're great,' and sing a song. Why that would have made you buy a Pontiac is anybody's guess." Now, he says, car makers have gotten their dealers to make better commercials, and to put more dollars behind them. This upsurge in the automobile corporate ad category parallels the skyrocketing spending for product ads for cars, which, Severance notes, for the first time became the leading industry in TV ad spending this year.

"The soft stuff was a fairly optional form of advertising for many companies," Garbett says, about the constant change of players. "They go into the project with wrong or confused expectations, and when they get disappointed in the results, they stop." Marketing-oriented campaigns, though, run by people with "the pressures of the marketplace on them," should keep running as long as they produce bottom-line results, he says.

But some of the swings of companies in and out of the top corporate ad ranks, Garbett suggests, happen because companies change their strategies from one year to the next, shifting their ad focus more onto the product one year (not counted in LNA's corporate ad tabulations), more onto the company behind the product the next (counted in the tabulations). That may be why Wang, Xerox, and others come and go on the list, he says. When they introduce a new product, all the money goes from corporate advertising to advertising for that specific product, creating a change in the tabulations even though there's been no change in the advertising budget at the company.

Though some media categories are down this year (notably network TV, which, for

Continued on page 31 ►

TABLE 1: CORPORATE ADVERTISING EXPENDITURES, 1932-1986

Corporation Advertising (in $ thousands)

	Consumer Magazines	Newspaper Supplements	Network Television	Spot Television	Radio	Outdoor	SIX-MEDIA TOTALS	Cable TV Networks*
1982	$205,300.1	$7,593.8	$150,102.9	$28,118.1	$11,175.2	$918.0	**$403,208.1**	*
1983	219,512.7	4,205.5	197,267.9	25,201.6	9,661.0	843.0	**456,700.7**	*
Percent change	6.9%	(44.6%)	31.4%	(10.4%)	(13.5%)	(8.2%)	**13.3%**	
1984	296,309.9	9,465.4	366,591.8	97,080.0	10,318.9	3,219.0	**782,985.0**	*
Percent change	34.9%	125.0%	85.8%	285.2%	6.8%	281.8%	**69.2%**	
1985	323,323.4	10,498.9	259,148.8	103,820.2	13,450.9	4,455.4	**714,697.6**	11,315.9
Percent change	9.1%	10.9%	(29.3%)	6.9%	30.4%	38.4%	**(8.7%)**	N/A
1986	343,693.3	11,924.5	246,029.1	141,065.8	25,262.1	8,022.8	**775,997.6**	9,794.0
Percent change	6.3%	13.6%	(5.1%)	35.9%	87.8%	80.1%	**8.6%**	(13.4%)

Association Advertising (in $ thousands)

	Consumer Magazines	Newspaper Supplements	Network Television	Spot Television	Radio	Outdoor	SIX-MEDIA TOTALS	Cable TV Networks*
1982	$46,479.7	$2,301.4	$60,286.5	$150,763.0	$6,365.8	$4,213.9	**$270,410.3**	*
1983	46,059.4	3,569.3	70,001.7	202,838.6	8,968.7	9,600.5	**341,038.2**	*
Percent change	(0.9%)	55.1%	16.1%	34.5%	40.9%	127.8%	**26.1%**	
1984	53,260.9	2,301.4	75,512.5	287,986.5	11,504.9	4,602.7	**435,168.5**	*
Percent change	15.6%	(35.5%)	7.9%	42.0%	28.3%	(52.0%)	**27.6%**	
1985	69,351.6	5,597.2	103,073.0	393,858.2	15,717.9	7,009.7	**594,607.6**	3,171.7
Percent change	30.2%	143.2%	36.5%	36.8%	36.6%	52.2%	**36.6%**	N/A
1986	79,732.8	5,864.7	147,625.2	571,025.9	19,703.5	8,053.2	**832,005.3**	6,180.3
Percent change	15.0%	4.8%	43.2%	45.0%	25.4%	14.9%	**40.0%**	94.9%

*1985 = first year measured

Source: BAR/LNA Corporate and Association Report as compiled by Leading National Advertisers

TABLE 2: TOP 10 LEADERS IN CORPORATE ADVERTISING SPENDING: CORPORATIONS

January-December 1986 (ranked by total media dollars, in $ thousands)

	Seven-Media Totals	Magazines	Newspaper Supplements	Network Television	Spot Television	Network Radio	Outdoor	Cable-TV Networks
General Motors Corp.	$43,216.3	$22,077.6	$996.9	$12,931.3	$2,706.0	$4,139.7	$175.7	$189.1
Ford Motor Co.	36,626.6	15,140.9	3,513.7	11,286.4	559.4	5,728.5	180.5	217.2
AT&T Co.	32,774.5	14,693.0	60.8	11,986.0	2,264.9	3,505.1	—	264.7
IBM Corp.	29,237.2	7,255.3	1,372.6	18,743.6	1,292.7	249.4	—	323.6
Dow Chemical Co.	24,488.3	7,865.8	5.7	11,189.1	2,243.9	3,139.6	44.2	—
GTE Corp.	20,992.1	4,537.8	77.7	8,230.8	8,102.4	—	—	43.4
Hewlett-Packard Co.	20,684.5	12.8	—	20,547.3	34.9	—	—	89.5
American Express Co.	16,592.9	3,974.5	83.2	7,526.5	5,000.8	—	—	7.9
Prudential Insurance Co. of America	14,662.3	4,598.9	63.6	8,592.6	682.8	—	2.6	721.8
Unisys	13,956.0	2,512.8	21.8	7,959.3	2,965.6	—	—	496.5
TOP 10 TOTAL	**$253,230.7**	**$82,669.4**	**$6,196.0**	**$118,992.9**	**$25,853.4**	**$16,762.3**	**$403.0**	**$2,353.7**

TABLE 3: TOP 10 LEADERS IN CORPORATE ADVERTISING SPENDING: ASSOCIATIONS

January-December 1986 (ranked by total media dollars, in $ thousands)

	Seven-Media Totals	Magazines	Newspaper Supplements	Network Television	Spot Television	Network Radio	Outdoor	Cable-TV Networks
GM Corp. Dirs. Assn.	$147,889.5	—	—	—	$147,721.1	$74.5	$93.9	—
American Dairy Assn.	99,309.7	$2,809.0	$654.0	$79,931.8	13,430.9	739.1	506.9	$1,238.0
Ford Auto Dirs. Assn.	63,468.4	26.7	—	—	61,232.6	—	2,209.1	—
Nissan Auto Dirs. Assn.	48,155.3	—	—	—	48,141.3	—	14.0	—
Toyota Auto Dirs. Assn.	36,593.2	—	—	—	36,587.4	—	5.8	—
Blue Cross/Shield Assn.	27,680.8	1,113.1	56.6	4,952.2	20,714.6	—	835.3	9.0
Chrysler Corp.	23,243.9	—	—	—	23,243.9	—	—	—
Volkswagen AG Dirs. Assn.	23,086.6	—	—	—	23,086.6	—	—	—
Toyo Kogyo Co. Auto Dirs. Assn. Franchise	22,313.3	—	—	—	22,313.3	—	—	—
Hyundai Group	21,606.1	—	—	—	21,606.1	—	—	—
TOP 10 TOTAL	**$513,346.8**	**$3,948.8**	**$710.6**	**$84,884.0**	**$418,077.8**	**$813.6**	**$3,665.0**	**$1,247.0**

Continued from page 28 ►
corporations, is down 5.1 percent) and others are up substantially (for corporations, radio is up 87.8 percent, and outdoor, up 80.1 percent; and for associations, network TV is up 43.2 percent and spot TV, up 45 percent), much of this change is traced back to the Top 10 spenders. Because the total dollars for corporate advertising is small, a hiccup by any of the bigger players can affect the totals. Ford Motor Company, for example, the largest advertiser last year, dropped its network TV spending by more than $18 million, significant when spending for the entire category is just $246 million.

"The old world of soft corporate advertising is gone," says Garbett. Corporate ads have become more hard-hitting.

Trends for "pure" types of corporate advertising are difficult to read, Garbett notes, because LNA counts cars in the same category as, say, Planned Parenthood. He suspects, though, that issue-oriented association spending has probably stayed relatively flat, because those organizations generally don't have the money to raise budgets much. The 40 percent increase in association spending, Garbett says, comes because it's easier to up the budget on a campaign that directly aids sales, which many of them now do.

Consumer magazines received the largest dollar expenditures from corporations, nearly $344 million, according to LNA. (Most of that money, the ANA study shows, goes to business magazines.) Associations, by contrast, put the greatest dollar volume into spot TV. Cable TV also showed a dramatic increase for associations, not surprising, since cable offers the targeted, local audience that many associations are trying to reach. Corporations, though, showed a decrease in spending for cable, but Garbett sees this decline as an anomaly and expects the figure to improve next year (cable was measured for the first time in 1985).

The ANA survey reveals increasing interest in sponsorship of public broadcasting

Continued on page 63 ►

THE DATA TRAIL

THE Baby Wipes sit on a table near Larry Jones's desk, but he claims it's mostly for the people on the *New York Times* account. The *Wall Street Journal*, he says, doesn't get your hands as messy. Jones should know; as research assistant at Leading National Advertisers, the preeminent chronicler of advertising spending, he logs seven hours a day, five days a week, pouring over the paper. It is at his desk that the *WSJ* advertising data begins its journey through LNA.

LNA's primary functions are tabulating ad spending in the 150 magazines of the Publishers Information Bureau, and producing a listing of expenditures in seven different media (this seven-media list does not include newspapers, aside from magazine supplements like *Parade*). Separately, though, LNA does monitor ad spending in several newspapers, including the nation's leading business paper. And with the *WSJ* chock full of corporate ads, this database is crucial for companies that want to track their brethren's spending.

Jones and compatriot Michael Schwartz scrutinize the many daily editions of the paper in precise order—East, South, Midwest, and West (and recently, for Monday and Friday editions, also Southern California and Southeast). East is usually the biggest, you see, so it's best to get it out of the way first.

Batches of the *WSJ* come by mail (pity the poor postman) from the paper's production sites across the country. When all the editions from the same day have arrived, the two men set to work. Theirs is the first step in a march that will take the data through the terrains of Coding, Checking, Entering, Entering Again, and Comparing.

With production tickets sent by the publisher and a copy of the paper itself sprawled on their desks, the men scrutinize each ticket, ferreting out information on the number of lines in the ad, the edition(s) it has run in, whether a position premium was paid, and the specific company and/or brand being advertised. Ever vigilant in its role as guardian of the data, LNA never accepts this last designation on face value from the publisher; it determines its own brand or corporation code in an often-thankless quest to provide a unified standard (see "Blurred Division," page 34).

Categorizing ads in *WSJ* was tough for the coders when they first started monitoring the paper a few years ago, says Jackie Jacob, LNA's director of database operations and research, because of all the financial ads. "We didn't know the difference between, say, a security offer and a tender offer," she says. A guidebook of terms and hints produced with *WSJ* has helped; now, differentiating even the additional subsets of mergers and acquisitions and announcements (such as personnel), recently requested by the paper, is a breeze.

At an average of one-and-a-half to two hours per edition—papers can run from the 50-odd-page editions in July and August (when the LNA staff tries to schedule its vacations) to the hefty 300-page Christmas issues—the coders are pleased if they each finish one full paper a day.

The paper and the marked-up production sheets then advance to Roger Dykeman, a three-year veteran of LNA, who checks for inadvertent errors by the first team (even Jones and Schwartz can have a bad day). *WSJ* also supplies the total advertising line count for each edition, and Dykeman must make sure its totals and LNA's come close. Dykeman looks the other way with discrepancies of less than 100 lines per edition—not a bad rate when you consider that each *page* of the paper has 1,776 advertising lines—but LNA says the difference rarely gets that high.

Two of LNA's several part-time typists then assume command of the data, separately entering the information into the computer. The sophisticated Digital system at LNA (on which all of LNA's other databases are also kept, and which LNA makes available online to its subscribers) discloses discrepancies between the two entries, and performs other safety checks as well. Data are then formatted for the inch-thick reports that LNA sends quarterly to its subscribers.

A self-proclaimed pack rat, Jacob would like to keep the back-up data at LNA indefinitely, but LNA would soon outgrow its newly renovated Madison Avenue space if Jacob had her way. So back issues are stored in folders around the office for about two years, when they are finally discharged from LNA's command.

—M.D.

Ad spending

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programs, a corporate ad category LNA does not monitor. Thirty-eight percent of ANA survey respondents are underwriting PBS programs in 1987, compared to only 12 percent in their survey a year and a half ago. " 'Enhanced underwriting,' [PBS's recently liberalized rules on what the sponsor can say in the plug, which make these corporate spots more of a commercial than they used to be] is almost certainly a major factor in this growth," the survey concludes. "So is a wider scope of programming with which corporations can identify. It's also an answer for getting out of clutter, providing a more 'corporate,' 'laid-back' look."

A change in PBS programming to more commercially oriented shows, especially at the local level, may also play a role in the increased use of public broadcasting sponsorship, Garbett speculates. "With programs like 'This Old House' or some of the gardening shows, it's not surprising that construction or gardening companies would sponsor the programs," he says. This type of programming is close to that of TV's early days, Garbett says, with shows that are close to the interest of the sponsor. The only problem, TBA's Severance notes, is the ratings. But then, the price is right.

Garbett expects 1987 to look similar to 1986, with spending up perhaps slightly. "The really big spenders don't increase their budgets as much as the smaller ones, so the totals shouldn't change much," he says. For some reason, he says, the big players seem to bump into an invisible ceiling, keeping their expenditures relatively constant.

But the more traditional corporate ads may soon make a comeback, if only temporarily. "Just about the time you're convinced that the era is dead," Severance warns, "conventional ads will come back out." Stay tuned for that to happen in 1988, he says, because the elections and the Olympics are prime vehicles for traditional corporate ad campaigns.

The review of corporate advertising spending is published each year in *PRJ*. It reflects figures compiled by LNA and Broadcast Advertisers Reports (BAR), which monitor and categorize advertising in select media after the ads have run. LNA's expenditures are calculated on the basis of one-time open rates from rate cards supplied by the media; therefore, actual expenditures, taking discounts into consideration, should be lower than reported. ■

Meryl Davids is associate editor of PRJ.

Questionnaire

Continued from page 64 ►

8. What type(s) of support does your organization or client(s) include in corporate donations? (MARK ALL THAT APPLY.)

- ☐ monetary
- ☐ equipment/supplies
- ☐ services (Please specify.) _____
- ☐ loaning employees for specific projects
- ☐ encourage employee volunteerism
- ☐ other (Please specify.) _____

9. What criteria does your organization or client's organization use to choose donation recipients?

- ☐ CEO/principal/corporate contributions officer feels strongly about recipient
- ☐ generate goodwill
- ☐ recipient solicited your organization's help
- ☐ increase visibility, name recognition, and contacts of your organization
- ☐ use your organization's staff downtime productively
- ☐ other (Please specify.) _____

10. How many people in your firm or department work on corporate contributions on a FULL-TIME basis?

- ☐ none
- ☐ 1-4
- ☐ 5-9
- ☐ 10 or more

11. How many people in your firm or department work on corporate contributions on a PART-TIME basis?

- ☐ none
- ☐ 1-4
- ☐ 5-9
- ☐ 10 or more

12. Please check the ONE category that best describes the organization you CURRENTLY work for:

- ☐ public relations firm
- ☐ independent counselor
- ☐ health care
- ☐ advertising agency
- ☐ industrial/manufacturing
- ☐ utility
- ☐ transportation/hotels/resorts/ entertainment
- ☐ scientific/technical
- ☐ government
- ☐ financial/insurance
- ☐ association
- ☐ education
- ☐ foundation
- ☐ religious/charitable organization
- ☐ other (Please specify.) _____

13. How many people work in your firm or department (including yourself)?

- ☐ 1
- ☐ 2-5
- ☐ 6-9
- ☐ 10-19
- ☐ 20-35
- ☐ 36-49
- ☐ 50-99
- ☐ 100 or more

14. How long have you worked in public relations?

- ☐ less than 1 year
- ☐ 1-4 years
- ☐ 5-9 years
- ☐ 10-14 years
- ☐ 15-19 years
- ☐ 20 or more years

15. What is your title? _____

16. Are you: ☐ male ☐ female

17. Are you a member of PRSA? ☐ yes ☐ no

18. Are you Accredited? ☐ yes ☐ no

19. What are the first three digits of your ZIP code? _____

Please return this Questionnaire to: The Questionnaire, *Public Relations Journal*, 33 Irving Place, New York, NY 10003. Thank you for your help.

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